IMAC Training and Technical Assistance
Meeting Minutes – November 16, 2004

Attendees: Theresa Fosbinder, Keli Poppe, Vicki Jessup, Jacquie Coutant, Deb Solis, Jenny Hoffman, Russell Yancey, Jeff Brikowski, Pam Lohaus, Stacia Jankowski, Lynda Fischer, Staci Wanty, Kevin Raines, Julie Loebel, Tricia Bless
This meeting was through a conference call, beginning at 10:00 a.m. and ending at 12:00 p.m.
Theresa introduced Jacaie Coutant from Milwaukee County, who is taking the place of Vanessa Robertson from Milwaukee County.

FUTURE MEETINGS
We had originally scheduled the next committee meeting for December 21st, but will move the meeting to December 14th at Fen Oak in Madison from 9-3. We'll make it a Christmas meeting with anyone that wants to bringing treats
2005: We decide to continue meeting monthly on the 3rd Tuesday of each month. Theresa will schedule Fen Oak and Oshkosh centers and confirm the dates and locations for the group.

REPORT TO IMAC
We're on the agenda to present at the big IMAC this week. We have been able to work with the big IMAC group successfully a couple of times already this year – they have devoted time in a couple of their meetings to helping us achieve our goals regarding mandatory training, as well as the CWW training model.
Since the big IMAC has already spent so much time on our issues, and since there are no pressing issue at this time to refer to them, this group agreed to simply present a summary of our activities over the past few months **(see attachment A).**

CWW ISSUES
It was mentioned that at the Green Bay and Eau Claire regional supervisors meetings, some of the counties were "upset" about the training being offered via distance. There were people who stated that they wanted to find ways to change the approach from distance to face-to-face. There were also concerns about the assessment being tied to the ID issuance. It was stated that these issues did not come up at the Madison regional meeting.
Another issue mentioned at the regional meetings was that the rollout schedule has not been presented. The group had some conversation about issues caused by the lack of a rollout schedule lack of clarity about how training fits into that schedule, and some ideas for addressing this issue.
Theresa mentioned that in order to start developing the training, a specific rollout schedule has not been necessary – so far we have just had to know the general rollout approach, and known that the specific counties would be fit into the timeline later. However, the lack of clarity around the rollout timeline seems to be causing concerns in local agencies. Training is just a part of the overall implementation and plan, so this concern cannot be fully addressed in this forum. The concern about the lack of clarity about the CWW implementation and rollout plan will be referred to BHCE management and/or the big IMAC as appropriate.
(NOTE: SINCE THIS MEETING, THIS ISSUE HAS BEEN REFERRED TO BHCE MANAGEMENT. BASED ON THE NEED ARTICULATED HERE, A COMMUNICATION HAS GONE OUT VIA THE CARES/POLICY AND TRAINING COORDINATORS STATING THAT SINCE WORK IS STILL BEING DONE TO ENSURE A SMOOTH AND ACCURATE ROLLOUT, THERE ARE NO FIRM DATES FOR THE CWW ROLLOUT AND/OR TRAINING - AND THAT WE WILL UPDATE LOCAL AGENCIES AS SOON SCHEDULES ARE FINALIZED). **(See attachment B)**

Theresa stated that she was unaware that the CWW – especially CWW training - topic that was going to be on the regional agendas, and that she will find ways to work with regional staff to more cleanly address this in the future. There are conference calls between central office and regional staff where this can be discussed so that the AAA staff can address CWW issues that come up, and/or appropriate central office staff can be invited to the regional meetings to talk about whatever CWW issues there are (implementation, training, etc.).

We also mentioned that decisions we have made about the training model and plans are out on the IMAC web site, and that people can refer to that if they have questions or concerns.

CWW TRAINING PLAN (See attachment C)
Background
The model we have created covers "CWW training for experienced workers who update CARES CR and AE and their direct supervisors". What we're focusing on now is getting developed this training program for these experienced workers who update CARES - our "core users" - and getting the program out there. There is also a set of users out there who are query only - this is our "non-core" audience The non-core users should still keep using their mainframe view while the worker web rolls out for the core users. We will focus on training the update workers to begin with. There will be a different communication approach for the non-core users at a later date.

There was discussion of the 3 proposed tracks of course work – one for eligibility workers (all programs), one for clerical workers, and one for administrators/managers.
There was also discussion of situations where workers and/ or processes may not fit cleanly into the core/non-core distinction, or where these users intersect in such a way that communication could get confusing – they could lose their common language (e.g. tran codes) for a period of time.
Examples are SeniorCare mixed cases and communication with the CAPO, and places where screen prints change hands, like Community Waivers and some child support situations.
There may also be some workers who update CARES but not CR and AE – example was a BV only user. (Note: Milwaukee calls these types of functions "special ops" units).
Most on the group said that since the time period in question is not that long, the communication issue should not be that bad – as long as we can provide a CARES screen to CWW page translation tool (which Kevin noted is part of the plan).
We think we also need to identify and analyze situations where screen prints change hands and see what the impact is – for example, for CW cases it might be OK until we put SFU and ED/BC screens on the web, since it is the budget screens which tend to change hands between the CARES worker and the case manager.
The group also agreed that this situation – the transition of core users to CWW – should be marketed to the non-core users so they are aware of it. There needs to be a clear distinction between core and no core users marketed as well, so that people (like the mentioned BV worker and others) will know where they fall and whether the CWW will impact them now and they have to do the training.
Jacaie also mentioned the need to consider QC workers whose role includes assessing workers - not just reporting on findings, but a role in assessing where the workers are having problems. These type of QC workers (may be primarily a county function rather than state) may want to also be using the CWW even though they only query. If they are going to help figure out what workers are doing wrong, they need to fully understand what the workers are doing to enter the data.

The group discussed that the agencies should also be able to have some discretion about whom they consider a "core" CARES user and thus whom they send to the training.

CWW Training model update
The prerequisite piece is being retooled so that these are not actually prerequisites. We're looking at calling these "preparatory resources" for those who decide they need them. 2 of these 3 pieces are available now – the CARES End User feedback website and the PTS Learner Support Services page (tools, resources for web basics and distance learning) The third piece about security and access (called "Access A to Z) is being worked on right now. This will include information about IDs, passwords, time frame, who to call, what number. Our goal is to have all three resources available at the end of January. People will have plenty of time then to get their training ID, etc. Note that these components won't be included in the training plan that shows up in the PTS Learning Center as they are not actually prerequisites.
The group agreed that this kind of clarification is needed – that there are people who don't know what a WAMS ID is or why they need it, etc. It was mentioned as an example that there was confusion about this when CSAW was rolled out – people did not know if they even had the right access or not. There was also discussion about the impact that will occur on training if the student has not done what s/he was

supposed to in terms of getting proper IDs, etc. We know this is an issue and will keep discussing how to handle this.
Theresa mentioned that there are 2 administrator's memos coming out that should help agencies understand and support staff ID and access needs – one will focus on IT standards and expectations, and one will focus on the CWW. With those in place, agencies can understand, support and help enforce what trainees need. There will also be Operations memo(s) produced as needed that further clarify details about the CWW rollout and training.
The Access A to Z piece should be out in January - in combination with the admin memos, this should help eliminate some of the problems we're talking about right now. The group discussed the fact that we need to make sure that people are learning about the access they should have, but are not attempting to actually get it too early.

The group decided not to go over all the details in the model as they have seen sever al previous versions and there are not a lot of changes.

Assessment update
Staci reported that the assessment workgroup has submitted recommendations to CWW, PTS and BHCE management. It is also possible that some of this may need to go to IMAC. The group is also working on how to write effective assessment questions – and sharing that that with the staff that will be writing the questions. The use of multiple choice, true/false, graphics, consistency among the questions. We're still at a place where we have different assessments for the different level of workers (client reg/update worker). The update worker/supervisor assessment is more involved
A recommendation is that we have the individual take the assessment the first time. If they pass it (we don't know a passing score at this time) they'll get their certificate they're done. They could then get their ID. If they don't pass they would go back and look at the course components and review, and can retake reviews as many times as they like, and then retake the assessment. If pass all is well, if they do not pass they get scheduled for lab.

The group discussed that some details would need to be filled into this conceptual model – things like level and juncture of supervisor intervention, how PTS Learning Center reports can support this process, and individual county variations in process all need to still be considered. The group agreed that it will be important for appropriate people in agencies (e.g. supervisors, local agency trainers) to have good data about this process. Jacaie added that the length of time the training is offered will help determine what reports are needed – counties need to plan the best they can so that workers are not left without production IDs after they are supposed to be using the CWW. We agreed to talk more about this at the December meeting in the context of CWW and beyond.

Russell mentioned that the capacity to print the assessment out might be valuable – we do have that capability in the tool we are planning on using.

Timeline
There was discussion of the proposed rollout and training timeline.

OTHER DISCUSSION
- We think there will be a maximum of approximately 16 hours of training.
- There will be a train the trainer event for agency CARES and training coordinators, as well as staff member(s) who will have case transfer responsibility. This event is tentatively for scheduled March 2005.
- The details of the case transfer process are still being worked out and will be based on the rollout schedule and timeline.
- List of agency participation for the RCR2B training: 1053 workers, 1004 completed, 95% completion. 49 people who enrolled but did not finish **(see attachment D)**
- December meeting – December 14, 9-3 at Fen Oak. Topics: Pathlore gap analyzer/groups and curriculums, 05 training plan, more on the CWW.

ATTACHMENT A

IMAC TRAINING AND TECHNICAL ASSISTANCE (TATA) SUBCOMMITTEE ACTIVITIES REPORT NOVEMBER 18, 2004

2004 MEMBERSHIP

Keli Poppe	Kenosha County
Vicki Jessup	BHCE – Quality Assurance
Jacaie Coutant	Milwaukee County
Deb Solis	Dane County
*Jenny Hoffman	Brown County
*Russell Yancey	Milwaukee County
Jeff Brikowski	BHCE – Food Stamp policy section
Pam Lohaus	DHFS/Regional Office
Stacia Jankowski	BHCE - Outreach
Dave Hippler	BHCE - Communications
Melissa Otter	BHCE – Systems
Lynda Fischer	DWD/ DWD-DHFS Partner Training Services (PTS)
Staci Wanty	UWO-CCDET/DWD-DHFS Partner Training Services (PTS)
Judy Johnson	UWO – CCDET/PAC
Margaret Romens	Dane County
Kevin Raines	Waukesha County/ DWD-DHFS Partner Training Services (PTS)
Julie Loebel	ACS/DWD-DHFS Partner Training Services (PTS)
Tricia Bless	UWO-CCDET/DWD-DHFS Partner Training Services (PTS)
*Theresa Fosbinder	BHCE/DWD-DHFS Partner Training Services (PTS)

* Co-chairs

CHARTER
IMAC TRAINING AND TECHNICAL ASSISTANCE SUBCOMMITTEE

This subcommittee was created in 2003 to impact all aspects of training and technical assistance services to local agencies and their workforce according to individual needs to achieve better program integrity and customer service.

2004 ACTIVITIES: SEPTEMBER - DECEMBER

MEETING DATE	MEETING TOPIC	ACTIVITIES
September 2004	Training Update Wisline Web participation, CWW training plan	Discussed how to get people involved in the training update Wisline Web events, Reviewed Reduced Change Reporting phase 2b participation. Made recommendations about the CWW training approach, including support of linking the production ID to assessment results, having direct supervisors take the same training programs as their staff, and creation of a "training call center" to support distance learning initiatives.
October 2004	NO MEETING	NO MEETING
November 2004	PTS Learning Center features, update/status of Cares Worker Web training	CWW training planning and development update including: • Information and feedback about core and non-core audience training • Core audience prerequisites • Assessment process • Plans for train the trainer event. Discussion of Food Stamp Reduced Change Reporting phase 2b training participation data. Began discussion of PTS Learning Center Groups and Curriculums feature and "gap analysis" feature and reporting capability.
December 2004 (projected)	CWW training plan and development, 2005 IM training plan	Review of proposed 2005 IM training plan. Continue discussion of PTS Learning Center Groups and Curriculums feature and "gap analysis" feature and reporting capabilities for CWW and beyond. CWW training plan and development - update and feedback

NOTE: In 2005, meetings will continue to be held on the 3rd Tuesday of each month, and will alternate between the Madison Fen Oak and Oshkosh regional training centers.

ATTACHMENT B

TO: CARES/Policy Coordinators and agency staff with training responsibilities

FROM: Amy Mendel-Clemens

DATE: November 24, 2004

RE: CARES Worker Web, Electronic Case File, ACCESS

As you may have heard by now, we will be rolling out the CARES Worker Web (CWW) in 2005. We are getting feedback that local agencies are very interested in receiving more detailed information about CWW implementation and training as soon as possible.

The plan is to conduct two rounds of pilot implementation before rolling out CWW around the state in a phased approach throughout 2005. DHFS is committed to ensuring that the CARES Worker Web is thoroughly tested and working smoothly before its implementation date in the first pilot agencies. Therefore, even though we have volunteer counties for the first pilot, we do not have firm dates for the pilot to start. This also means that dates for the rest of the rollout have not been determined yet since they are contingent upon the start dates and success of the pilots. As soon as we have a pilot and statewide rollout schedule, we will issue an extensive Administrator's Memo that will contain all the information agencies will need to plan for the CWW implementation, including training and other necessary processes. We estimate this memo will be available sometime in December. We appreciate your patience while we determine exactly when CWW can and should be rolled out and how to best accommodate agencies' training and planning needs.

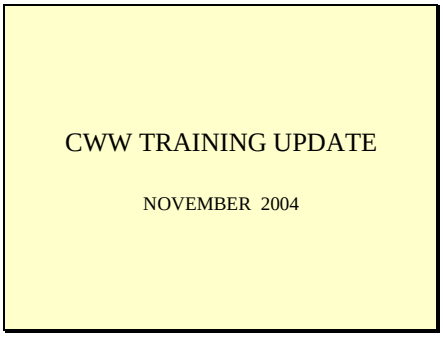
Also planned for implementation sometime starting in 2005 is the expansion of the Electronic Case File (ECF) to receive and store scanned documents. The ECF is already being used statewide as part of the Employer Verification Form (EVF) process, and expanded ECF capability is currently being piloted in 3 agencies. The ECF rollout schedule will be created based on feedback from the pilots, and will be announced as soon as it is known. We will be making every effort to *avoid* overlapping the CWW rollout schedule so agencies are not expected to convert to this new filing system while transitioning to the CWW.

Over the next 18 months, we will also be expanding the uses of the ACCESS web based self-screening tool to include change reporting and query capabilities for recipients, as well as an online application process. We will be gathering information and feedback from local agencies as we decide how best to do this and how to roll it out. As soon as we have a timeline for this phase of the project, we will share that with you.

Thank you.

ATTACHMENT C

Slide 1



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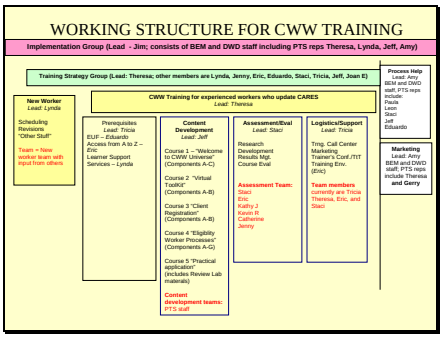

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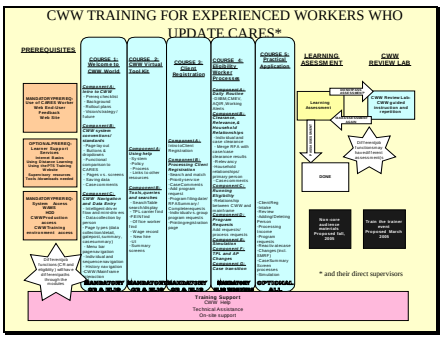

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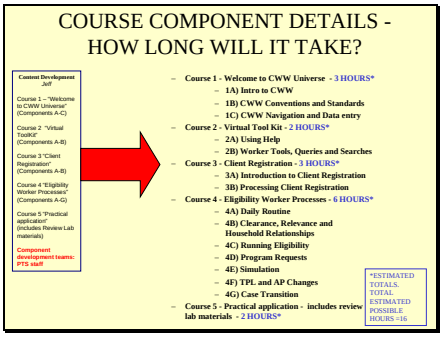

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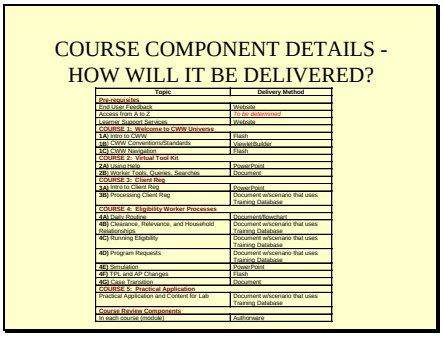

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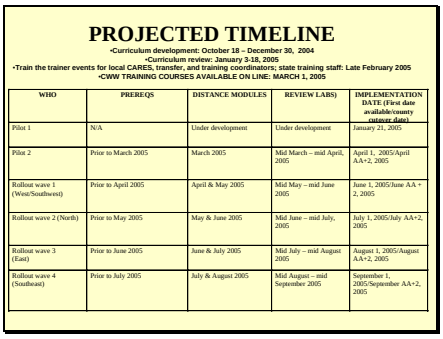

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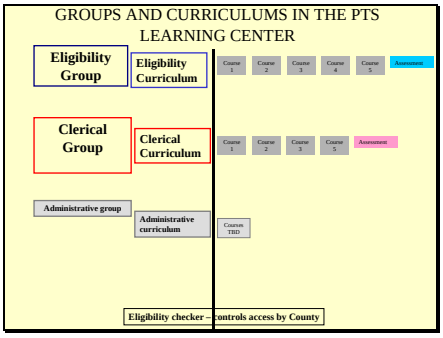
GROUPS AND CURRICULUMS IN THE PTS LEARNING CENTER
Eligibility Group
Eligibility Curriculum
Course 1
Course 2
Course 3
Course 4
Course 5
Assessment
Clerical Group
Clerical Curriculum
Course 1
Course 2
Course 3
Course 5
Assessment
Administrative group
Administrative curriculum
Courses TBD
Eligibility checker – controls access by County

ATTACHMENT D

LOCAL AGENCY FS RCR 2B PARTICIPATION/COMPLETION DATA AS OF 11/15/04

AGENCY	ENROLLED	COMPLETE	%
ADAMS CO DHS	4	4	100%
ASHLAND CO DHS	5	5	100%
BAD RIVER TRIBE DSS	2	2	100%
BARRON CO DHS	12	12	100%
BAYFIELD CO DHS	5	4	80%
BROWN CO DHS	40	38	95%
BUFFALO CO DHS	3	3	100%
BURNETT CO DHS	6	4	67%
CALUMET CO DHS	5	5	100%
CHIPPEWA CO DHS	14	14	100%
CLARK CO DSS	7	7	100%
COLUMBIA CO DHS	9	9	100%
CRAWFORD CO DHS	6	6	100%
DANE CO DHS	69	67	97%
DODGE CO DHS	17	14	82%
DOOR CO DSS	5	5	100%
DOUGLAS CO DHS	12	10	83%
DUNN CO DHS	8	6	75%
EAU CLAIRE CO DHS	20	19	95%
FLORENCE CO DHS	1	1	100%
FOND DU LAC CO DSS	27	26	96%
FOREST CO DSS	4	3	75%
FOREST CO POTAWATOMI TRIBE	1	1	100%
GRANT CO DSS	4	3	75%
GREEN CO DHS	5	5	100%
GREEN LAKE CO DHS	5	5	100%
IOWA CO DSS	6	6	100%
IRON CO DHS	4	4	100%
JACKSON CO CSA	5	5	100%
JEFFERSON CO DHS	13	13	100%
JUNEAU CO DHS	5	5	100%
KENOSHA CO DHS	32	29	91%
KEWAUNEE CO DSS	3	3	100%
LA CROSSE CO CSA	25	20	80%
LAC DU FLAMBEAU TRIBE DSS	2	2	100%
LAFAYETTE CO DHS	4	4	100%
LANGLADE CO DSS	5	5	100%
LINCOLN CO DSS	5	5	100%
MANITOWOC CO DHS	10	10	100%
MARATHON CO DEPT OF E&T	23	23	100%
MARINETTE CO DHS	12	12	100%
MARQUETTE CO DHS	1	1	100%
MENOMINEE CO DHS	2	2	100%
MILWAUKEE CO DHS	208	201	97%
MONROE CO DHS	7	7	100%
OCONTO CO DHS	6	6	100%
ONEIDA CO DSS	6	6	100%
ONEIDA NATION	4	3	75%
OUTAGAMIE CO DHS	27	27	100%

OZAUKEE CO DSS	7	7	100%
PEPIN CO DHS	3	3	100%
PIERCE CO DHS	5	5	100%
POLK CO DHS	10	10	100%
PORTAGE CO DHS	13	11	85%
PRICE CO DHS	6	6	100%
RACINE CO DHS	38	37	97%
RED CLIFF TRIBE	3	3	100%
RICHLAND CO HHS	6	6	100%
ROCK CO HSD	43	42	98%
RUSK CO DHS	4	4	100%
SAUK CO DHS	10	9	90%
SAWYER CO DHS	7	7	100%
SHAWANO CO DSS	5	5	100%
SHEBOYGAN CO DHS	20	18	90%
SOKAOGON CHIPPEWA TRIBE	1	1	100%
ST CROIX CO DHS	8	8	100%
STOCKBRIDGE-MUNSEE TRIBE	1	1	100%
TAYLOR CO DHS	5	5	100%
TREMPEALEAU CO DSS	9	9	100%
VERNON CO DHS	6	6	100%
VILAS CO DSS	4	3	75%
WALWORTH CO DHS	15	13	87%
WASHBURN CO DSS	5	5	100%
WASHINGTON CO DSS	14	13	93%
WAUKESHA CO DHS	32	31	97%
WAUPACA CO DHS	13	13	100%
WAUSHARA CO DHS	5	5	100%
WINNEBAGO CO	23	20	87%
WOOD CO DSS	21	21	100%
TOTALS	**1053**	**1004**	**95%**